

City of Newton
Purchasing Department
COMPARISON
RFP# 15-47 Fund Management Services - Horace Cousens Industrial Fund

Department: Treasury
OPENING: 11:00 a.m. December 4, 2014
PROJECT MANAGER: Linda Dubuque

PROPOSER		Evaluation	Addendum	Total
Cambridge Trust Company 75 State Street 18th Floor Boston, Ma 02109		HA		\$19,950.00
Eastern Bank Wealth Management 265 Franklin Street Boston, Ma 02110		NA+		\$20,000.00
F.L. Putnam Investment Management Company 20 William Street Ste G40 Wellesley, Ma 02481		A		\$16,800.00
Joseph W. Hayes,CFP Financial Advisor Boston Hill Advisors LLC 100 Andover Bypass Street #201 Andover, Ma 01845		U		n/a
Morgan Stanley Wealth Management 53 State Street 39th floor Exchange Place Boston, Ma 02109		A-		\$21,000.00
Rockland Trust 2036 Washington Street Hanover, Ma 02339		HA		\$11,200.00

Awarded to:

Chief Procurement Officer Date

Department Head Date

Mayor or his designee Date